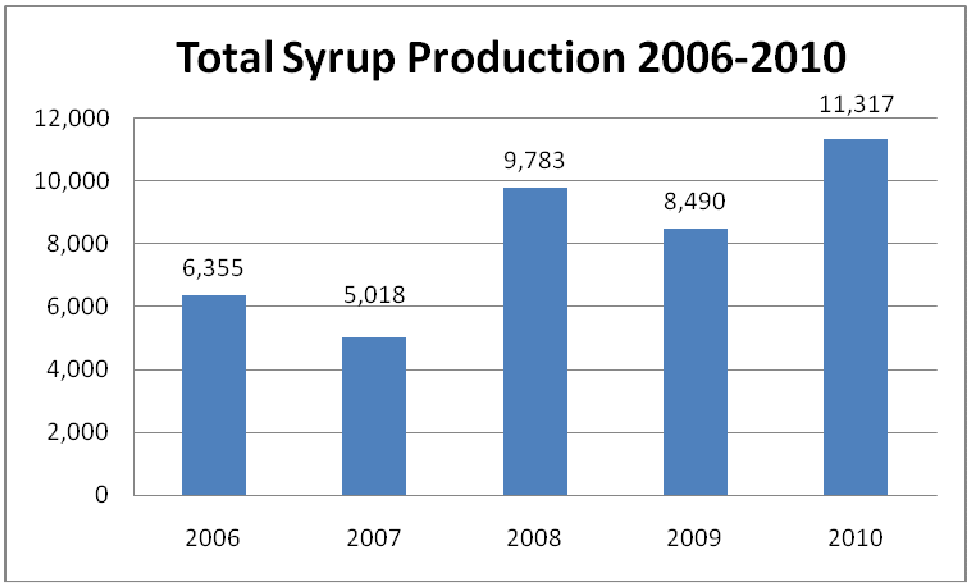
INDIANA'S 2010 MAPLE PRODUCTION

Shortly after the close of the 2010 Maple Syrup season, 184 questionnaires were sent to all known producers of maple syrup in Indiana. 95 individuals promptly responded to the questionnaire resulting in almost a 52% response rate, higher than the 46% response rate in 2009.

For the sake of comparison of similar climatic regions, the results were broken down per two major regions. The dividing line chosen was U.S. Route 40 bisecting the State into a Northern region and a Southern region. 23 questionnaires were returned from the south region and 71 came from the northern region.

Of the producers that responded to the questionnaire, 38% of these folks produced syrup in 2010, just slightly higher than the 37% reported in 2009. 17 producers from the southern region and 54 producers from the northern region reported production in 2010.

68% of the states' total syrup production of 11,317 gallons was accounted for by 15 large producers. The total number of gallons produced was about 25% higher than the 8490 gallons produced in 2009. Northern producers accounted for 7004 gallons compared to 7382 gallons produced in 2009 while southern producers generated 4313 gallons, significantly higher than the 1108 gallons reported in 2009. The graph below reflects the total number of gallons produced each year from 2006.



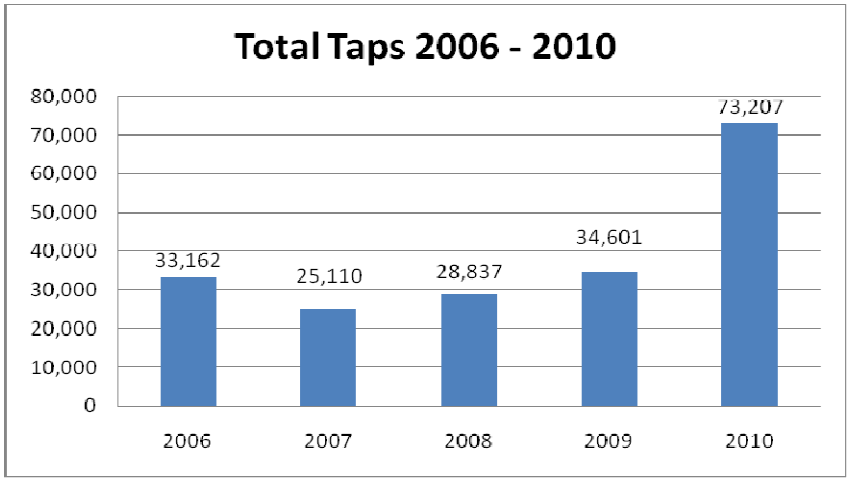
There are 55 counties in the state that have at least one active maple syrup producer. Elkhart County was once again the county with the most reported sugar camps – 32.

Elkhart County was the home to the largest sugar camp in the northern region, producing almost 1016 gallons of syrup. Orange County is the home of the largest southern sugar camp as well as top honor for the state at 1350 gallons.

The overall state average for the opening date was 2/24/10 and the closing date was 3/14/10. Regionally, the average opening dates were 2/23/10 and 2/19/10 for the north and south respectfully. The average closing dates were 3/13/10 for the north and 3/11/10 for the south.

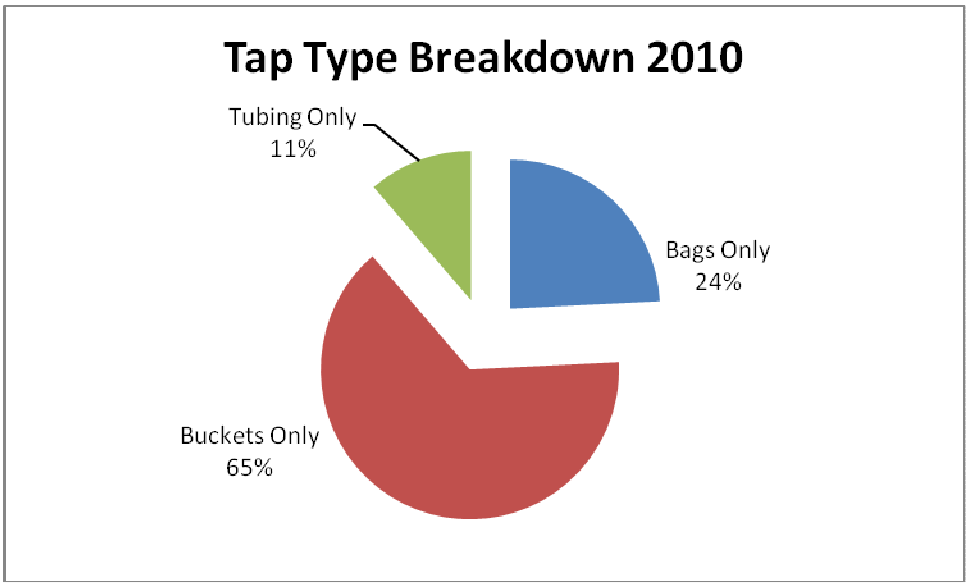
The average amount of sugar water (sap) needed to produce a gallon of syrup was 41.6 gallons in the north and 44.1 gallons in the south. The state average was 42.2 gallons of sap to produce a gallon of syrup. Using these figures, we can estimate that approximately 477,577 gallons of sugar water was collected in 2010. The average amount of sap needed in 2010 to produce a gallon of syrup may not be wholly accurate, as quite a few producers do not maintain accurate records of sap inflow. The average amount of syrup produced per camp was slightly over 129 gallons, a little higher than the 124 gallons per camp reported in 2009. Although the majority all the sugar water was produced at the producer's own sugar bush(es); however in 2010 producers did purchase over 425,000, considerably higher than the 119,000 gallons of sugar water from outside producers in 2009.

Of the 73,207 taps which is the most taps set in several years, 29% of the state's syrup production was accounted for via producers using only buckets for sugar water collection. 22,528 buckets were used in 2010 for collection purposes. The amount of sugar water collected solely by buckets accounted for total syrup production of 3130 gallons in the north and 66.5 gallons in the south region. 40 Indiana maple syrup producers used an average of 489 buckets in their collection operations. The graph below represents the total number of taps used each year from 2006 to present.



Buckets continue to remain the most popular way to collect syrup regardless of the region. This year however, we did see an increase of the use of plastic bags for collection purposes. The largest single producer utilizing buckets hung 2600 buckets in the northern region and 375 buckets in the southern half. The pie chart below shows the number of

producers per type of tap used in 2008.

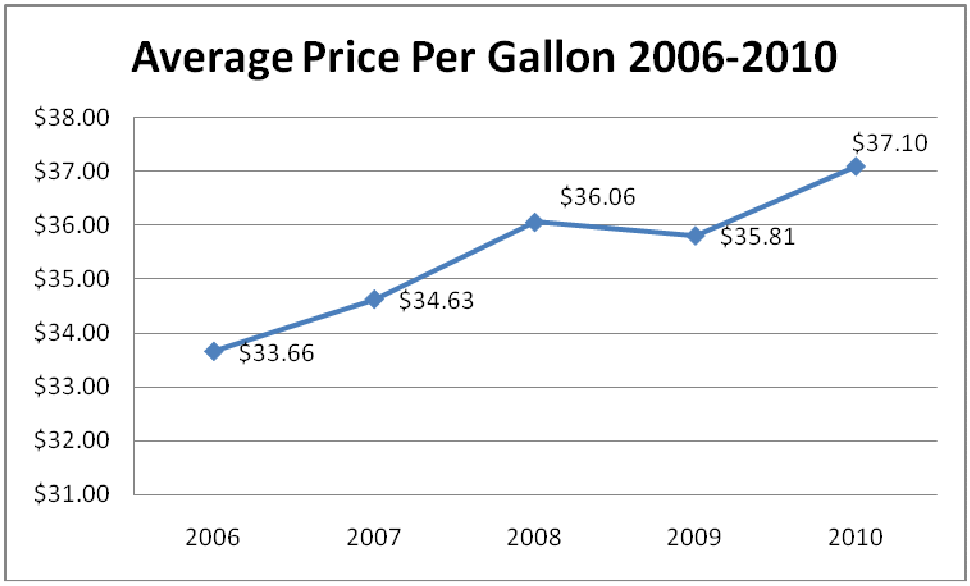


As stated earlier, the use of plastic bags increased in 2010. 21 producers used 30,069 collection bags. This was a major increase from the 545 bags used in 2009. The primary reason for the increase was due to locating several producers who had never completed our survey in the southern part of the state. Many of these producers also used buckets and or tubing as well. Producers using only bags to collect sap set on the average, approximately 1970 taps. Those using only bags for sap collection accounted about for 3,790 gallons in 2010. On a regional basis, those using plastic sap collection bags were split pretty evenly between the two regions. Six northern producers using 885 bags collected 315 gallons of syrup. 12 producers in the southern region using only plastic bags collected 3,475 gallons and set 28,670 bags for collection.

A number of producers are trying tubing for sugar water collection and are slowly changing over as terrain, dollars and results allow. Statewide, fifteen persons (13 in the northern region and 2 in the south) used almost 235,000 195,000 feet (over 44 miles) of tubing for collection purposes in 2010. Those using tubing produced 4,236 gallons of syrup.

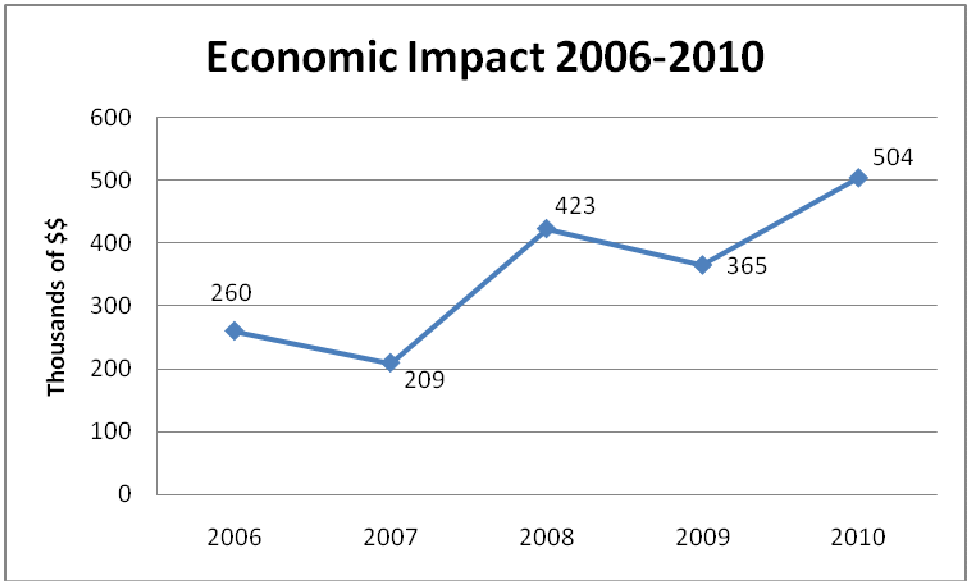
The statewide average price received for a retail gallon of syrup was $37.10 which is 1.29 higher than the price reported for 2009. The average price per retail gallon in the south was $45.33 (it should be noted that only 3 surveys from the south contained price data). Northern producers averaged $37.07 per retail gallon. The average statewide price received for a quart of retail syrup was $12.95. For the past couple of years more surveys

were returned this year with information about pricing per pint. The state average per retail pint was $7.52. Statewide wholesale average gallon price was $33.00. The graph below depicts the average price per retail gallon of syrup since the year 2006.



The statistics gathered via our 2010 maple syrup production questionnaire most likely will not reflect the true income generated from Indiana's producers. The statewide reported syrup income for 2010 (multiplying the average $/per gallon X reported production) is almost $420,000. However, if one appreciates that which was consumed via the producers' family, given away, or simply not reported, the calculated dollar figure may very well conservatively grow to $504,000. Assuming this figure to be realistic, the average dollar return per tap hole is $7.15, a little lower than the $10.51 reported in the

2009 maple syrup producer's survey. The graph below shows the estimated economic impact for maple syrup production during the past 5 years.



Sales do not appear to be a limiting factor for Indiana maple product producers; rather the inability to produce enough syrup due to the unfavorable weather and/or short tapping seasons were the greatest impediments to finding our maple fortunes. Prime tapping conditions center on below freezing temperatures of an evening with a fairly fast thaw in the mornings which normally allows for good syrup flow. 2010, according to those who commented on the season was a "below average" year with 71% of the producers reported this season was below, 19% as average, and only 9% as above average. Most comments stated it was a very short season with many producers only reporting a 10 day to 2 week season.

Overall, most of the produced syrup is sold at a retail level. Of those reporting sales, 30% of those respondents reporting production, state that at least a portion of their production is given away or consumed domestically; of course these same producers tend to be smaller in scope and production. Packaging preferences show the majority favoring retail sales in gallon containers, fewer favoring quarts, with remainders sold in smaller units. A few producers offer maple sugar, creams, candies, cookies, etc., but apparently these maple products do not account for substantial percentages of any one producer's sales.

We are all aware that each sugar bush has unique characteristics and that no two bushes produce alike. Although Indiana is a relatively small geographic area, the variation in weather is significant as evidenced by prior years. As reported earlier, conditions in 2009 were slightly better than average. 2010, due to the short season and warmer weather was a "below average" year in both weather and production of syrup.

49 respondents stated they would like to be listed in the Indiana Maple Syrup Producers Brochure. As time and funds permit, we are hoping to prepare an updated brochure.

Additionally, we believe it would be beneficial to have "Indiana generic" maple syrup articles on hand for the barrage of requests from reporters for local newspapers and other media come next February, 2011.

I sincerely thank all the maple producers for their prompt questionnaire responses. I have updated our maple database and will continue to be a contact for Indiana maple products. ***Please remember the data compiled in this report is only as good as the data received. To be able to more accurately report maple syrup production figures, we'll continue to need a high response rate.*** Although our time is limited for personal visits to your operation, we do welcome your calls and inquiries on all facets of maple production. Special forest products such as maple syrup contribute substantially to many rural folk's income while offering wholesome therapy at the same time.